

Instructions for Auditor of State 17TC worksheet

We have placed the 17TC worksheet for counties that have up to fifty (50) taxing districts on the Auditor of State's website. If your county has more than 50 taxing districts and you would like to use the 17TC worksheet provided by our office please contact us and we will email you a worksheet that will allow up to 100 taxing districts.

Following are the line by line instructions for the attached 17TC worksheet for Settlement:

Please keep in mind you will only enter applicable data in the cells that are in blue.

1. Open the 17TC Worksheet. The first worksheet should be the summary page. Click on the cell C4 and enter the County Name. Click on Cell C7 to enter the tax year. The entries in Cells C4 & C7 automatically update the balance of the worksheets.
2. Click on cell B70 to enter whether this is for June or December Settlement. Click on cell B74 to enter the date. Click on cell D70 to indicate the tax year of the report. All other cells on the summary sheet are automatically updated as data is entered on the balance of the worksheets.
3. Rename the worksheet. Left click on worksheet A(1). To rename the worksheet right click on the worksheet tab. Click on RENAME. Enter the taxing district name. Renaming the worksheet tab(s) to the taxing district name is optional.
4. Designate the taxing district on the worksheet. Click on Cell A8. Enter the taxing district name. Each worksheet will be a separate taxing district. Label each sheet with the taxing district name. The taxing district name will carry forward to the summary page.
5. Enter the State Homestead Credit rate. Click on Cell G9 to enter the State Homestead Credit rate for the taxing district you are entering data.
6. Enter the COIT Homestead Credit rate, **if applicable**. Click on Cell H9 to enter the COIT Homestead Credit rate for the taxing district you are entering data.
7. Enter the CEDIT Homestead Credit rate, **if applicable**. Click on Cell I9 to enter the CEDIT Homestead Credit rate for the taxing district you are entering data.
8. Enter 17T information. Go to the first data entry line Cell A13 and enter the name of the taxpayer. Continue to enter data as you scroll across the form.
9. The Total Line (Row 113) will carry forward to the summary page.

You will not be able to enter data in the columns labeled "STATE HOMESTEAD CREDIT DUE STATE", "COIT HOMESTEAD DUE COIT FUND", "CEDIT HOMESTEAD CREDIT DUE CEDIT HSC FUND", or the TOTAL REFUND column. These columns will calculate automatically for you.

The prior steps should be repeated on all worksheets used.

Instructions for Auditor of State 17TC Worksheet (continued)

The formula to allocate the homestead credit amount between State, COIT and/or CEDIT homestead credit is as follows:

State Homestead Credit column amount equals the total homestead credit amount divided by the total homestead credit rate times the state homestead credit rate.

COIT Homestead Credit column amount equals the total homestead credit amount divided by the total homestead credit rate times the COIT homestead credit rate. If your county only has State and COIT homestead credit and not CEDIT homestead credit, then the COIT homestead credit amount equals the total homestead credit amount minus the State homestead credit amount.

CEDIT Homestead Credit column amount equals the total homestead credit amount minus the State homestead credit amount and minus the COIT homestead credit amount. If your county only has State and CEDIT homestead credit and not COIT homestead credit, then the CEDIT homestead credit amount equals the total homestead credit amount minus the State homestead credit amount.

A special note for COIT Homestead Credit and CEDIT Homestead Credit Counties:

If the homestead credit amount included on the 17T sheet is before the adoption of the COIT and/or CEDIT homestead credit, then none of the homestead credit is COIT and/or CEDIT homestead credit. If the homestead credit amount included on the 17T sheet is before the adoption of the COIT and/or CEDIT homestead credit you will need to make manual adjustments to the 17TC worksheet. If this is the case, please contact our office and we will remove the protection from the worksheet. Another option is to use a separate worksheet for those refunds for property taxes from prior years which did not include COIT and/or CEDIT homestead credit. In this case when entering the homestead credit rates you would only enter the state homestead credit rate on the worksheet. The worksheet will then calculate refund amounts with state homestead only. If you choose the option of using a separate worksheet for prior year refunds you will need to combine the worksheet including COIT and/or CEDIT totals with the worksheet with state homestead only totals for entry on the apportionment sheet state form 102.

If the homestead credit shown on the apportionment sheet is homestead credit after the adoption of the COIT and/or CEDIT homestead credit, then the homestead credit amount shown on the 17TC worksheet needs to be allocated between State, COIT and/or CEDIT homestead credit.

If the 17TC worksheet is being used for June Settlement, the Total line of the summary sheet must agree with the amount on line 3 Section A of the June Settlement Sheet 105. If the 17TC worksheet is being used for December Settlement, the Total line of the summary sheet must agree with the amount on line 39 of the 105 Settlement Sheet. The Total line for the individual taxing districts must agree with the amount on line 39 of the 102 Apportionment Sheets.

If you have any questions pertaining to the 17TC worksheet for December Settlement provided by the Auditor of State's office or these instructions please contact Brenda Alyea at balyea@auditor.in.gov or at 317-232-3336. Or you may contact Janie Cope at jcope@auditor.in.gov or at 317-233-3008.